

Tool X-B
Living Options Monitoring Instrument

Name:

Reviewer:

Date:

Qualified Intellectual Disability Professional (QIDP):

Unit/Home:

- Clearly reflect when person/legally authorized representative (LAR) chooses not to discuss.
- Avoid “canned language.”
- Reflect respectful language.
- Living Options Monitoring must be completed annually and as requested by the person/LAR.
- Reviewer can note N/A for Living Options Numbers 3, 4 and 5 if the person/LAR chooses not to further discuss living options and for Permanency Planning Number 2 if the facility does not receive local authority (LA) results of permanency planning.

Question/Probe	Guides to Reviewer	Yes	No	Comments
Living Options				
1. Discussion indicates efforts made to expose the person to what his or her living options may be and efforts made to understand the person's preference.	<ul style="list-style-type: none"> • What information has been provided to the person, guardian/family related to living options? • How were options presented? <ul style="list-style-type: none"> ○ Visits ○ Brochures ○ LA Explanation of Services and Supports document ○ Discussion at meetings ○ Previous community living • Did the person communicate a clear preference of where he or she wanted to live (verbally/non-verbally — describe)? • Did the guardian/family communicate a clear preference of where he/she/they wanted the person to live? 			
2. Discussion indicates efforts made to educate and/or determine the guardian's/family's awareness of living option alternatives.				

Question/Probe	Guides to Reviewer	Yes	No	Comments
3. Discussion indicates that the PST has determined how medical needs can be met in a community setting and/or the barriers to meeting those needs.	<ul style="list-style-type: none"> • Specific needs that require special consideration are listed. • Options to address these needs in the community are listed. • Barriers to addressing these needs in the community are listed. • Statements are personalized to reflect the person's special circumstances. 			
4. Discussion indicates that the PST has determined how behavioral/psychiatric needs can be met in a community setting and/or the barriers to meeting those needs.				
5. Discussion indicates that the PST has determined how quality of life issues can be met in a community setting and/or the barriers to meeting those needs.				
6. Discussion indicates that the LA was invited to the Living Options Discussion meeting.	<ul style="list-style-type: none"> • Efforts were made to involve a representative of the LA in the meetings — documentation clearly indicates the invitation to attend. 			
7. Discussion reflects LA input/recommendations.	<ul style="list-style-type: none"> • Efforts were made to obtain and elicit input/recommendations from the LA (for example, LA attendance at the meeting, pre-meeting conferences, telephone conversations). Documentation should state the LA's input/recommendation or the lack of if none was offered. 			
8. The PST determination regarding the most appropriate living arrangement is supported by the Living Options Discussion and the rest of the annual plan.				

Question/Probe	Guides to Reviewer	Yes	No	Comments
Permanency Planning	The facility is required by statute and rule to cooperate with the LA to include timely provision of information and records, participate in permanency planning as requested and prohibits the facility from providing inaccurate or misleading information regarding the risks of moving a person to another setting. Note any exceptions.			
1. Permanency needs are addressed by the PST, per the annual planning meeting summary or interim meeting summary, as appropriate, but in particular during the Living Options Discussion meeting.	<ul style="list-style-type: none"> • Permanency needs (that is, family contact) are addressed by the PST regardless of receipt of current LA permanency planning results. 			
2. The results of permanency planning are congruent with Living Options deliberations/recommendations.	<ul style="list-style-type: none"> • If results of permanency planning are received by the facility (the LA is required to provide the facility a copy of permanency planning results). 			